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## MAKE SMART MOVES, NOW AND IN THE FUTURE

Think about what you want to accomplish at today's expo and beyond. Use the list below as an ongoing way to track what you've already done and what you want to complete next week, next month, etc.

# FINANCIAL FITNESS EXPO

NRM-7923AO.2 (12/14)

### START YOUR "PERSONAL TRAINING"

- Enroll in deferred compensation
- Determine your investing goals and risk tolerance
- Choose your investment mix (asset allocation)
- Set your contribution amount

### KEEP IT UP

- Schedule an account review
- Attend informative workshops (see list at right)
- Use online tools to measure your progress
- Increase your contribution amount
- Rebalance or exchange funds
- Roll over or transfer-in assets from other eligible accounts

### FLEX YOUR HARD-EARNED FINANCIAL MUSCLE

- Meet with a retirement specialist to discuss your retirement income needs
- Take advantage of special "catch-up" limits
- Review your retirement income options
- Select a retirement payout option that suits your needs

*Investing involves market risk, including the possible loss of principal.*

*Information provided by Retirement Specialists is for educational purposes only and is not intended as investment advice.*

### SCHEDULED EVENTS:

**If you still have questions after today's expo, please contact me.**

# SHAPE UP YOUR PLAN FOR THE FUTURE